

# SMITH LEONARD PLLC 15<sup>th</sup> ANNUAL CPE DAY

Thursday and Friday, Oct 28 and 29, 2021 · 8:30 am to 12:30 pm

Streamed Virtually via Zoom



## EARN UP TO 8 CPE CREDITS – REGISTER HERE

In accordance with the standards of the National Registry of CPE Sponsors, CPE credits have been granted based on a 50-minute hour.

**Who should attend:** All active CPAs, CFOs, Controllers and Company Owners

**Delivery Method:** Group Internet-based

### **THURSDAY, OCTOBER 28: 8:30 - 12:30**

#### **Economic Update | Ahmed El Nokali and David Valentiner – FNB**

*Field of Study – Economics; Program Level - Advanced*

The 2021 Economic Update will focus on current trends and economic data, including the impact of COVID, on the global, national, and local economy. This presentation will enable participants to optimize business strategy.

Prerequisites: Familiar with basic macroeconomics principles

Advanced Preparation: None

CPE Credit: 1                      CPE Minutes: 50

#### **2021 Accounting Update for Private Companies | John Nicolson and Scotti Teschke – Smith Leonard**

*Field of Study – Accounting; Program Level - Intermediate*

This private company accounting update will focus on lease accounting. Participants will be informed of the latest and upcoming rule changes to allow them to effectively plan for 2022 and beyond.

Prerequisites: Familiar with accounting rules and environment applicable to private companies

Advanced Preparation: None

CPE Credit: .40                      CPE Minutes: 20

#### **Tax Update | Patrick Willis – Smith Leonard**

*Field of Study – Taxes; Program Level - Intermediate*

The 2021 Tax Update will review key updates from the latest proposed tax legislation, as well as impacts of PPP, to enable proper tax planning from 2021 and beyond.

Prerequisites: Intermediate knowledge of tax code

Advanced Preparation: None

CPE Credit: .80                      CPE Minutes: 40

#### **Retirement Planning: Do the Math | Craig Moser – Maestro Wealth**

*Field of Study – Finance; Program Level - Intermediate*

Can I make my retirement work? How do I get what I want for as long as I want it? This course will provide insights and tools for participants to consider when planning for retirement.

Prerequisites: Basic knowledge of wealth management and financial planning

Advanced Preparation: None

CPE Credit: .80                      CPE Minutes: 40

#### **NC Ethics | Garland Granger**

*Field of Study – Behavioral Ethics; Program Level - Intermediate*

NC Ethics covers current issues and special topics in ethics in the accounting profession and the current edition of the AICPA Code of Professional Conduct. Participants in this presentation will learn to define ethics in the context of being ethical versus acting ethically, identify the types of accounting services in which the fiduciary standard applies, and differentiate between rules-based, principles-based, and objectives-oriented accounting.

Prerequisites: Knowledge of AICPA Code of Professional Conduct

Advanced Preparation: None

CPE Credit: 1                      CPE Minutes: 50

## **FRIDAY, OCTOBER 29: 8:30 - 12:30**

### **PSYFI Introduction | David Mykel – PSYFI, Inc.**

*Field of Study – Personal Development; Program Level - Basic*

Understand how to train your Brain, Body and Breath as one so you can take command of your Time and your Life. Activating the 4-Ps of our scientifically proven PSYFI System and our B3 Methodology you'll learn the key three reasons why the current models in psychology and fitness are failing you and exactly how to get back on track.

Prerequisites: None

Advanced Preparation: None

CPE Credit: 1                      CPE Minutes: 50

### **Brain | David Mykel – PSYFI, Inc.**

*Field of Study – Personal Development; Program Level - Basic*

Master your mind by working with your brain through an evolutionary lens. Applying key principles in psychology and neuroscience you'll learn how to mitigate stress, reduce distractions and achieve immediate and sustainable focus anytime, anywhere.

Prerequisites: None

Advanced Preparation: None

CPE Credit: 1                      CPE Minutes: 50

### **Body | David Mykel – PSYFI, Inc.**

*Field of Study – Personal Development; Program Level - Basic*

Discern that what you've been taught about fitness is wrong and it's not your fault. Then learn key concepts of how simple movements can enhance your body and regulate your emotions while increasing productivity and decreasing stress.

Prerequisites: None

Advanced Preparation: None

CPE Credit: 1                      CPE Minutes: 50

### **Breath | David Mykel – PSYFI, Inc.**

*Field of Study – Personal Development; Program Level - Basic*

Train in ancient breath-work techniques combined with cutting-edge neuroscience so you can increase productivity, decrease anxiety and relax faster while avoiding burnout in the office, at the gym and at home.

Prerequisites: None

Advanced Preparation: None

CPE Credit: 1                      CPE Minutes: 50

## **Conference Policies**

**Refunds:** No refunds issued for cancellations after October 24, 2021. No refunds issued for no-shows. Participants may be substituted without any fee.

**Program cancellation:** If insufficient registrations are received, the event will be cancelled seven days in advance of the presentation.

**Concerns:** Complaints or comments should be addressed to Denise Brumfield at Smith Leonard, [dbrumfield@smith-leonard.com](mailto:dbrumfield@smith-leonard.com) or 336.821.1321.

Smith Leonard PLLC is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have the final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: [www.nasbaregistry.org](http://www.nasbaregistry.org).

